



MONEY TREE
FUNDRAISING

Trust Fundraising Kick Start Programme

Who are we?

Money Tree Fundraising works with charities to set up and grow fundraising from trusts, companies and wealthy individuals. In 2015 we were named **Best Strategic/Fundraising Consultancy** by the Institute of Fundraising for our work with grassroots charities. We understand the challenges smaller charities face with specialist knowledge, capacity, skills.

We are fundraising practitioners as well as consultants. Our expert trust fundraisers have combined experience of all types of charity and have **raised more than £46m** over their **cumulative 227 years' experience**.

We are on a mission to embed sustainable high value fundraising within charities of all size, through our expert advice and delivery.



Why trust fundraising?

UK charities received £4.0bn from trusts in 2014/15 – an increase of £0.5bn on the previous year. This income stream accounted for 16% of the sector's growth over the last two years.

This is a source of income that can provide large sums for projects, often secured for more than one year, within a short time period. Once set up, this is a steady source of income and could offer a return of 10 times your investment. You start to receive grants within six months of starting.

The secrets to successful trust fundraising

Knowing who to approach

Knowing how to package your work into funder-friendly proposals and projects

Having enough time to dedicate to developing the projects and writing the applications

When you know **who** to approach, **how** to create a compelling proposal and you have the **capacity** to do so, you will raise **more money** to deliver your organisation's vision.

At Money Tree Fundraising **we know trust fundraising**. We have worked with dozens of organisations keen to raise more money in order to expand the life-changing work they do. Their trust income grew when we addressed the key problems we encounter with our clients time and again:

- ✗ Not knowing how to find the right trusts to approach
- ✗ Not knowing how to write compelling proposals
- ✗ Not having the time to write the applications

The Trust Fundraising Kick Start programme delivers:

- ✓ A list of relevant trusts
- ✓ Strong written proposals delivering income¹
- ✓ Capacity to kick-start your programme
- ✓ New fundraising skills for you and your team

¹ we would expect at least income to the level of your investment within 12 months of the programme but cannot offer any guarantees.

Trust Fundraising Kick Start

Our tried and tested approach will take you through the five essential stages of a successful trust fundraising programme:

1

Immerse

We assess where you've come from, what you've done, what has worked (or not), what you've got and how ready you are.

2

Propose

We package your work into a project with a clear budget, ensuring that you can measure success against pre-set objectives. We ensure that you have all of the supporting documentation, processes and procedures that trusts will need to see.

3

Research

Our prospect researcher finds the trusts who set out to support the work that you do.

4

Plan

We prioritise the list of trusts and create an action plan for applications.

5

Apply

We write the applications, we give you the templates you need to write your own applications in the future and we can critique those applications to make sure you are on track.

At the end of the Kick Start programme there will be additional trusts that you can approach, a template proposal and expertly-written applications that you can use as a model for submitting your own applications. We would welcome the opportunity to develop a long term trust application programme with you.

This is a partnership

When we work together with our clients we have the greatest success.

Your input is particularly needed whilst we immerse ourselves in your organisation, whilst we are developing the proposal and writing a clear budget.

We offer four levels of trust fundraising support through our Kick Start programme.

	Bronze	Silver	Gold	Platinum
Price ex VAT	£2,497	£4,997	£7,497	£12,497
Duration	from 12 weeks	12 weeks	18 weeks	28 weeks
Immerse	self-review using our tools	we will review your current situation		
Propose	we will guide you to create a single strong proposition	we will create a strong proposition for your work		
Research	20 prospects	20 prospects	30 prospects	50 prospects
Plan	we will coach you through the planning	we will plan our approaches to maximise results		
Apply	expert critique of 10 applications	applications to the value of at least £60k ²	applications to the value of at least £90k ²	applications to the value of at least £150k ²
		expert critique of a further 10 applications		
		coaching to drive progress for a further 12 wks		

² it will not be possible to undertake complex applications such as Reaching Communities, Children in Need or Comic Relief within this allowance due to the size and complexity of these applications. We are happy to apply for those for a supplementary charge.

Results

By partnering on the Trust Fundraising Kick Start programme you will receive:

- ✓ An objective assessment of your organisation's readiness for trust fundraising
- ✓ Tailored and targeted applications written by industry experts
- ✓ A proposal template including budget
- ✓ Additional trusts for you to approach
- ✓ Increased skills and confidence in trust fundraising
- ✓ Expert critique of those first applications you write
- ✓ Regular coaching to give you advice and to drive the programme forward

Next steps

Book an exploratory call to find out how we can help you. Please email findoutmore@moneytreefundraising.co.uk

"CommUNITY Barnet worked with Money Tree fundraising to implement a new fundraising coaching service for small charities in Barnet, North London. All the charities worked with reported that they felt they had gained key fundraising skills and they had significantly more confidence in their fundraising practice. At time of writing, three Barnet charities have between them raised £127,500 and all felt that Money Tree fundraising's input had been significant in helping them reach their financial goals."

Julie Pal, CommUNITY Barnet

Case Study

SeeBeyondBorders is a charity working to improve the standard of education in Cambodia through expert coaching and support of teachers who had set up a UK charity in order to fundraise in the UK. Following a review, we determined that trust fundraising offered the quickest returns with the lowest risk for the organisation.

Over the next 8 months, Money Tree Fundraising worked with SeeBeyondBorders to set up and develop their trust fundraising. Over that time, working on average 7 days per month, we delivered:

- ✓ **\$100,000 UNESCO award**
- ✓ **33 trust applications submitted to a total value of £80,000**
- ✓ **5 grants received to a total value of £19,000**
- ✓ **22 decisions still pending** (at time of writing)

A further three months was spent ensuring all knowledge and skills was transferred to the team that had been established in the UK so that they could maintain the momentum built up in the trust fundraising programme and continue to deliver results with minimal external support.

The Money Tree fundraising Trust Experts

Our team has experience raising funds for every type of charity and beneficiary group:

- ✓ Animals
- ✓ Armed forces
- ✓ Community development
- ✓ Culture
- ✓ Disability
- ✓ Education
- ✓ Environment
- ✓ Health
- ✓ Higher education
- ✓ Hospice
- ✓ Housing
- ✓ International
- ✓ Mental health
- ✓ Poverty
- ✓ Recreation
- ✓ Religion
- ✓ Rights
- ✓ Sport
- ✓ Children & young people
- ✓ Older people
- ✓ Specific groups



Alison Cordingley is an enthusiastic professional with experience of

fundraising in a wide range of causes. She has worked in the voluntary sector since 2000 and has extensive experience in trust fundraising across a range of causes. Alison has raised over £1m for the organisations with which she has worked over the past 14 years.



John Harris has worked creatively in support of charities for many years.

This includes winning funding for enterprises still thriving: a housing co-operative, a new-build community-run children's nursery, a community amateur tennis club. He has excellent skills in helping organisations to generate appropriate income and writing effective funding applications.



Sarah Parkhouse has over 15 years' success in securing funds to continue or

expand existing services, often exceeding targets and delighting her clients or employers. She has experience of fundraising through trusts as well as grants on both sides of the government contract landscape having acted as both a commissioner and commissioned service.



Andy Bond has raised close to £2m for various charitable organisations

over his 7 years' experience. These have included community, arts, and education groups within the UK, and environmental & international development organisations working across the globe. He is a skilled prospect researcher, and imaginative writer with a talent for bringing out a projects most compelling aspects.



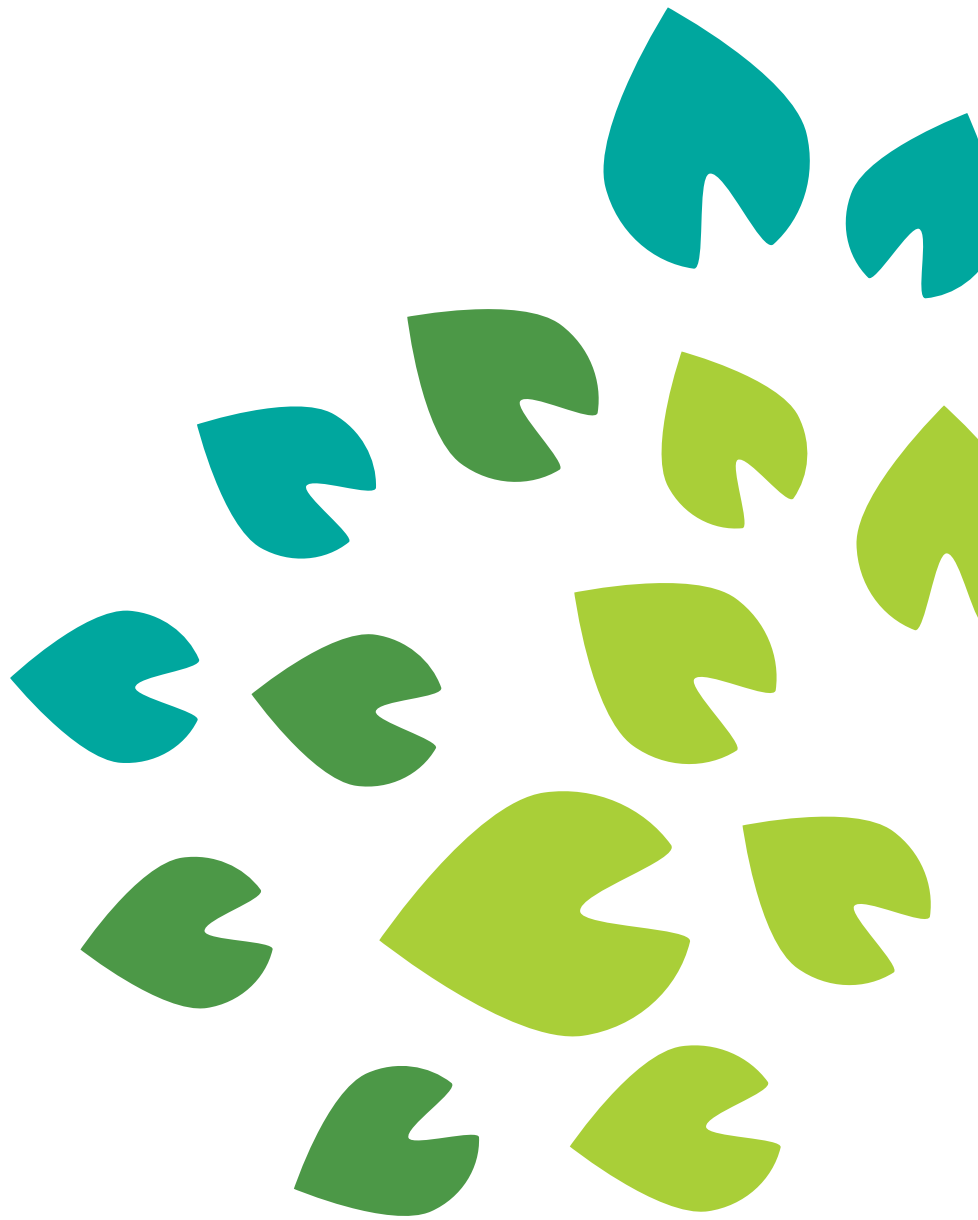
Karon Phillips is an accomplished fundraiser, coach and trainer.

She has nearly 20 years' experience leading voluntary sector organisations and has run both local and national charities. Karon's particular strength lies in developing strong and successful written proposals for both trusts and the Lottery.



Sophie Klein has raised over £.6m since starting in fundraising in 2010 and boasts

a 75% success rate for asks over £10,000. She is skilled across all aspects of trust fundraising from research to writing, process to impact. Her passion lies in creating great relationships between charities and funders.



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Growing your high-value giving

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Registered in England and Wales no 07766374

Printed June 2017

